

Exercise Trends: Inc Impact of COVID-19 - UK - July 2020

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“Competition between the offline and online fitness markets has intensified, and operators on both sides are racing to incorporate the best of both. Venue operators will need to expand their digital content offers and emphasise their position at the centre of communities. Digital brands should use individuals’ data to offer hyper-personalised coaching to meet their unique health and fitness goals.”
– Lauren Ryan, Leisure Analyst, 12 July 2020

This report looks at the following areas:

What you need to know

Nearly a third of consumers take part in exercise to relieve stress, making it the second most common motivator behind only fat loss. The mental benefits of exercise are now considered just as important as the physical benefits, with heightened stress levels surrounding COVID-19 only likely to spur this on further.

The impact of COVID-19 on the health and fitness sector has been somewhat polarising. On one hand, private health and fitness clubs, public leisure centres and organised sport have suffered greatly due to an extensive period of closures lasting around four months in most cases. On the other hand, interest in and usage of in-home exercise products and services such as fitness equipment and virtual platforms have surged.

Competition between the offline and online fitness markets has intensified, and operators on both sides are racing to incorporate the best of both. Venue operators will need to expand their digital content offers and emphasise their position at the centre of communities. Digital brands should use individuals’ data to offer hyper-personalised coaching to meet their unique health and fitness goals.

Whilst health and fitness venues will take a significant hit in 2020, there is good reason for operators to be optimistic about the long-term future. COVID-19 has heightened awareness about the benefits of exercise for both physical and mental health, with a third of consumers saying exercise has become a bigger priority for them since the start of the outbreak.

Key issues covered in this Report

- **The impact of COVID-19 on the health and fitness sector.**
- **The long-term opportunities in home fitness.**
- **How, where and why consumers exercised prior to COVID-19, and what changes have occurred as a result of the pandemic.**
- **Consumers’ attitudes towards mental health and the role of exercise within this.**

Covered in this Report

This Report provides an in-depth look at the exercise market in the UK by analysing exercise and fitness trends, consumers’ behaviours and attitudes.

COVID-19: Market context

This Report was prepared on 9 July 2020.

The first COVID-19 cases were confirmed in the UK at the end of January 2020 with a small number of cases in February. The government focused on the ‘contain’ stage of its strategy, with the country continuing to operate much as normal. As the case level rose significantly, the government ordered the closure of non-essential stores on 20th March 2020.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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A wider lockdown requiring people to stay at home except for essential shopping, exercise and work 'if absolutely necessary' followed on 23rd March. Initially, a three-week timeframe was put on the measures, which was extended in mid-April for another three weeks.

On 10 May 2020, the Prime Minister announced revised guidance, recommending that people who could not work from home should return to the workplace, and giving people more scope to spend time out of the home. Further relaxations to lockdown rules were announced in the week of 23rd May, including gradual reopening of non-essential retailers and increased opportunities for social interaction across households. Hospitality businesses were allowed to reopen in England on 4 July.

Health and fitness context

On 20 March, Prime Minister Boris Johnson ordered the closure of gyms and leisure centres across the UK to fight the spread of COVID-19. The large majority (if not all) of gyms and leisure centres reacted quickly to the news, automatically freezing memberships to ensure members would not be paying unnecessarily.

The UK government's stay-at-home guidance acknowledged the importance of physical activity for mental and emotional wellbeing. When further lockdown rules were implemented on 23 March and people could only leave the house for essential purposes, this included exercising once per day.

On 11 May, the public in England were allowed 'unlimited exercise' and could rest and sit outside or play sports with members of their own household.

From 13 May, sports courts including basketball and tennis courts, bowling greens and playing spaces such as golf courses were able to reopen. Other outdoor sports such as angling were also allowed to resume. All of these activities were to be undertaken alone, with members of the same household or with one other person from a different household.

On 23 June, the government announced the relaxation of the two-metre social distancing rule from 4 July, instead changing it to 'one metre plus' meaning two metres where possible but at a minimum, one metre.

As a result, most leisure facilities were able to reopen on 4 July including outdoor gyms and playgrounds. This included recreational sport in outdoor locations with the exception of close-contact team sports. However, 'close proximity' venues such as indoor gyms and swimming pools remained closed.

Following lobbying from industry body ukactive, Culture Secretary Olive Dowden announced on 9 July that outdoor pools and certain team sports could reopen from 11 July and indoor gyms, pools and sports facilities may reopen from 25 July.

Economic and other assumptions

Our economic assumptions are based on the illustrative scenario included in the Bank of England's Monetary Policy Report, released on 7th May 2020. The scenario suggests that UK GDP could fall by 14% in 2020, recovering by 15% in 2021, and that unemployment will reach 8% by the end of the year, easing slightly to 7% by the end of 2021. The current uncertainty means that there is wide variation on the range of forecasts, however, and the numbers presented in the BoE's illustrative scenario are at the more pessimistic end of the spectrum.

We are working on the assumption that a vaccine will be available by mid-2021, but that there will be continued disruption to both domestic and global markets for some time after that.

As long as there is not a second wave of infections, social distancing measures should be gradually relaxed over the course of 2020, but we don't expect industries such as hospitality, travel and live entertainment to return to any kind of normality until a vaccine is introduced.

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Table of Contents

Overview

What you need to know
 Key issues covered in this Report
 Covered in this Report
 COVID-19: Market context
 Health and fitness context
 Economic and other assumptions

Executive Summary

Impact of COVID-19 on the health and fitness sector
 Short, medium and long-term impact on the industry
 Figure 1: Expected impact of COVID-19 on the health and fitness sector, short, medium and long term, 12 July 2020

Market background
 Activity levels on steady incline
 Figure 2: Levels of activity in England, November 2015-November 2019

COVID-19 severely restricted exercise options...
 ...before venues were allowed to reopen

Private health and fitness club membership jumped prior to COVID-19
 Figure 3: Membership of private health and fitness club prior to COVID-19 outbreak, June 2020

Leisure centre membership lags behind
 Companies and brands
 Fitness clubs pivot to digital
 Connected fitness brands hot property
 Peloton expands digital presence
 'Mental health gym' concept launched in Manchester
 Joe Wicks launches daily PE With Joe
 Third Space launches kids' club
 Sport Climbing set to make Tokyo Olympics debut

The consumer
 Seven in 10 Brits exercised regularly prior to lockdown
 Figure 4: Exercise frequency – NET, 2-13 March 2020

Opportunity to push daily exercise
 Figure 5: Exercise frequency, 2-13 March 2020

Exercise frequency increased during lockdown
 Figure 6: Days done 30 minutes or more physical activity in last week, 3 April-22 June 2020

Walking most common exercise
 Figure 7: Exercise type, 2-13 March 2020

Multiple exercise types mean more regular exercise

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Mental benefits of exercise now play a crucial role

Corporate wellness services more crucial during homeworking age

Figure 8: Exercise motivations – NET, 2-13 March 2020

COVID-19 will only strengthen preference for outdoor exercise

Figure 9: Exercise locations, 2-13 March 2020

Consumers adapt to new locations

Figure 10: Attitudes towards attending a gym, June-July 2020

Growing opportunities to link mental health and exercise

Figure 11: Attitudes towards mental health and exercise, 2-13 March 2020

Exercise events provide more than just a challenge

Figure 12: Participation and interest in exercise challenges and events, 2-13 March 2020

Social needs can make fitness more enjoyable for over-55s

Figure 13: Exercise barriers, 2-13 March 2020

What we think

The Impact of COVID-19 on the Health and Fitness Sector

The market

COVID-19 severely restricted exercise options...

...before venues were allowed to reopen

Equipment manufacturers face supply issues

The consumer

Consumers adapt to new locations

COVID-19 will only strengthen preference for outdoor exercise

Price will be critical for younger consumers upon reopening of venues

Opportunity to boost walking and cycling in the 'active travel' revolution

Equipment-less fitness back in vogue...

...but lockdown presents opportunity for equipment rental

Mental benefits of exercise now play a crucial role

Social fitness can provide an antidote from lockdown isolation

Companies and brands

Fitness venues pivot to digital

Existing content platforms grab new partnerships

Connected fitness equipment market heats up

COVID-19: Market context

Issues and Insights

COVID-19 accelerates demand for connected fitness

The facts

The implications

Remote working era needs new approaches to corporate wellness

The facts

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The implications

The Market – What You Need to Know

- Obesity epidemic major health problem
- Activity levels on steady incline
- COVID-19 severely restricts exercise options
- Consumers adapt to new locations
- Exercise frequency increased during lockdown
- Private health and fitness club membership jumped prior to COVID-19
- Leisure centre membership lags behind
- Individual exercise more popular than group sports

Market Background

Over-55s population continues to grow

Figure 14: Life expectancy at attained age (years), by gender, England, 2001-19

Obesity epidemic major health problem

Figure 15: Adult (over 16 years old) body mass index, by weight category, England, 1993-2018

Activity levels on steady incline

Figure 16: Levels of activity in England, November 2015-November 2019

Interest in exercise on seasonal cycle

Figure 17: UK trends in Google searches for 'exercise', January 2010-20

Private health and fitness club membership jumped prior to COVID-19

Figure 18: Membership of private health and fitness club prior to COVID-19 outbreak, June 2020

Leisure centre membership lags behind

Sports participation broadly stable

Figure 19: Total sport played, July 2017-July 2019

Individual exercise more popular than group sports

Figure 20: Types of sport played, July 2017 and July 2019

Market Drivers

COVID-19 severely restricts exercise options

Fitness venues forced to shut

Lockdown enforces exercise restrictions

Facilities given reopening date

Figure 21: Attitudes towards attending a gym, June-July 2020

Consumers and brands adapt to new locations

Home

Figure 22: Participation in home workouts since COVID-19 outbreak, 26 March-16 April 2020

Outdoors

Wellbeing higher on the priority list

Figure 23: Changes in lifestyle priorities since COVID-19 outbreak, 7-14 May 2020

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Exercise frequency increased during lockdown

Figure 24: Days done 30 minutes or more physical activity in last week, 3 April-22 June 2020

Growing spotlight on mental health

Financial situation linked with activity levels

Figure 25: Exercise activity, by financial situation, March 2020

Companies and Brands – What You Need to Know

Fitness clubs pivot to digital

Connected fitness brands hot property

Peloton expands digital presence

'Mental health gym' concept launched in Manchester

Joe Wicks launches daily PE With Joe

Third Space launches kids' club

Sport Climbing set to make Tokyo Olympics debut

Launch Activity and Innovation

Fitness clubs pivot to digital

Les Mills grabs a suite of content partnerships

David Lloyd launches Clubs@Home

London boutique 1Rebel unveils digital class offer

Home gyms get re-invented

Peloton expands digital content presence

Connected fitness brand Mirror bought by retailer Lululemon

FORME Life launches to pre-order

Holistic wellbeing trend goes mainstream

'Mental health gym' launched in Manchester

David Lloyd opens wellbeing-focused pop-up restaurant

Digme Fitness streams virtual series for Mental Health Awareness Week

Fitness for the whole family

Joe Wicks launches daily PE With Joe

Third Space launches kids' club

Unconventional exercise offers novel alternatives

Tough Mudder brand acquired by Spartan

Ninja Warrior rapidly expands obstacle sites across the UK

Sport Climbing set to make Tokyo Olympics debut

Corporate wellness gets another look

Hussle launches corporate fitness service

The Consumer – What You Need to Know

Seven in 10 exercised regularly prior to lockdown

Opportunity to push daily exercise

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Walking most common exercise
 Multiple exercise types mean more regular exercise
 Mental benefits of exercise now play a crucial role
 Corporate wellness services more crucial during homeworking age
 COVID-19 will only strengthen preference for outdoor exercise
 Growing opportunities to link mental health and exercise
 Exercise events provide more than just a challenge
 Social needs can make fitness more enjoyable for over-55s

Exercise Frequency

Exercise frequency boosted by lockdown
 Figure 26: Exercise frequency – NET, 2-13 March 2020

Opportunity to push daily exercise
 Figure 27: Exercise frequency, 2-13 March 2020

Exercise Types

Opportunity to boost walking and cycling in the 'active travel' revolution
 Figure 28: Exercise type, 2-13 March 2020

Race to turn lockdown joggers into lifetime runners
 Figure 29: Future intentions to use fitness technologies, by usage of fitness technologies, 4-18 June 2020

Multiple exercise types mean more regular exercise...
 Figure 30: Exercise frequency, by repertoire analysis of exercise types – NET, 2-13 March 2020

...leading to popular cross-training combinations
 Figure 31: Exercise type, by exercise type, 2-13 March 2020

Younger consumers prefer more intense workouts
 Figure 32: Exercise type, by age, 2-13 March 2020

Exercise Motivations

Mental benefits of exercise now play a crucial role
 Fat loss key motivator for a third
 Prompts shift from 'fitness brand' to 'wellness brand'
 Figure 33: Exercise motivations – NET, 2-13 March 2020

Appearance paramount for younger Brits...
 ...but it's time to change the message
 Figure 34: Exercise motivations – NET, by age, 2-13 March 2020

Corporate wellness partnerships will appeal to stressed out professionals
 COVID-19 shines spotlight on fitness of older adults
 Exercises chosen according to motivations
 Figure 35: Motivations to exercise, by exercise types, 2-13 March 2020

Exercise Locations

Lockdown surge for home exercise options

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Figure 36: Exercise locations, 2-13 March 2020

- Urban living needs smart solutions
- Opportunity to utilise exercise equipment in more homes
- Brands show flexibility to get in the door
- Tech solutions bring the in-person experience home
- Pressure to sustain virtual exercise habits past lockdown
- Safety critical for indoor venues

Attitudes towards Mental Health and Exercise

Nearly seven in 10 care more about mental health than in the past

Figure 37: Attitudes towards mental health, 2-13 March 2020

Growing opportunities to link mental health with exercise

Holistic exercise concepts appeal to over half of Brits

Figure 38: Attitudes towards exercise and mental health, 2-13 March 2020

Participation and Interest in Exercise Challenges and Groups

Exercise clubs and challenges tap into 'social fitness' trend

Figure 39: Participation in exercise challenge/group – NET, by Mintel identity trends driver statement, 2-13 March 2020

Nearly a third would tackle obstacle course in the future

Figure 40: Participation and interest in exercise challenges and events, 2-13 March 2020

Barriers to Exercise

Social needs can make fitness more enjoyable for over-55s

Time barrier eased through lockdown

Figure 41: Exercise barriers, 2-13 March 2020

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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